



## **Procedure: Scheduling Appointments**

Functional Area: IV Organization & Management

Section: E4

Citation: 246.7(f)(2); 246.7(b)(5);

Approval Date: 6/2015

Revised Date: 7/2016

<b>Purpose</b>	Provide guidance on scheduling appointments for applicants and clients to assure optimal access and compliance with regulatory requirements.
<b>State Policy</b>	Appointments will be scheduled for all clients at all clinics served by local agencies.
<b>Local Agency Policy</b>	<p>A written policy which addresses how appointments will be scheduled must be developed by each local agency and approved by the State WIC office before implementation. The following areas should be addressed:</p> <ul style="list-style-type: none"><li>• Number and type of appointments scheduled each hour</li><li>• Communication between staff regarding changes and/or additions to the appointment schedule</li><li>• What happens when clients are “late” for their appointment</li><li>• Staggering of starting times and lunch times of staff when possible</li><li>• How no-shows who call or walk-in are handled.</li><li>• Flexibility in accommodating special circumstances.</li></ul>
<b>Check Issuance Appointments</b>	Appointments for check issuance may be given on a monthly, bi-monthly or tri-monthly schedule. The policy for high risk clients and those categories identified for enhanced opportunities for nutrition education should be followed when scheduling appointments.
<b>Late Appointments</b>	The clinic schedule should allow for flexibility when evaluating situations where participants are late or need to reschedule (e.g. icy roads, car trouble, no sitter). Clients should not be penalized in these situations if they are "late for the appointment". Every effort should be made to provide benefits at the visit or to reschedule within a short (1 week) time frame. If it is not possible to work the client into another day within a week of the original appointment, mailing the checks should be considered.

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**Working  
Applicant/clients**

Special consideration will be given to working clients or applicants when scheduling appointments to minimize time absent from the workplace.

In areas with no or poor public transportation special consideration should be given to applicants/clients who do not work, but whose personal transportation is used by another family member who does work.

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**New Applicant  
Appointments**

All individuals wishing to participate in the program should have equal access to appointments. Individuals currently participating in the program should not receive preferential treatment in scheduling appointments. Once a client's certification period expires, that client becomes, in effect, a new applicant again.

A number of appointments on a daily or weekly basis, should be set aside for first time applicants.

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**Walk-Ins**

Clients/applicants who walk-in for service without an appointment will be given an appointment for the earliest possible time. If no appointment is available for the current day an appointment will be offered another day at that site or at another clinic site. See Processing Standards procedure for additional guidance.

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**Call-In Requests for  
Appointment**

Applicants who call-in and request to schedule an appointment to apply for WIC benefits should be given the first available appointment. Migrant, homeless and pregnant applicants who call to request an appointment must have an appointment scheduled within 10 days. All other applicants must have an appointment scheduled within 20 days.

Satellite clinics that are only in a community 1 or 2 days each month and are unable to meet the 10 or 20 day requirement should offer the applicant an appointment at the next closest clinic where an appointment is available within 10/20 days. The offer and the appointment date should be documented in the applicant's record.

If due to resources, timing of satellite clinic or space limitations the agency cannot schedule and process the applicant within these time frames the state office should be notified.

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**Lack of Appointment  
Slots**

The State WIC office may implement a waiting list for scheduling appointments. The local agency will use a categorical priority system for scheduling appointments. This system would proceed from pregnant or breastfeeding women to infants to children to non-breastfeeding postpartum women.

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**Overbooking**

Consideration should be given to over-booking appointments. This can be effective in avoiding slack time due to no-shows. Tracking no-show rates for new and subsequent certification appointments is helpful in determining how and when to overbook.

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**Reminding Clients of Appointments**

Agencies should develop a system to remind persons who require expedited services (pregnant women, migrant, homeless) participants (by mail or telephone) of certification appointments. This is especially useful in decreasing no-show rates for first-time appointments.

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**Client Notification of Appointment Policies**

The local agency shall clearly publicize/post appointment policies to inform all clients. Clients will be encouraged to notify the local agency to make appointments, to inform staff if they will be late or need to cancel an appointment.

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**Pregnant Women Who Miss Appointment**

Local agencies shall attempt to contact each pregnant woman who misses her first WIC appointment to apply for WIC benefits.

At the initial contact, when scheduling the certification appointment staff should collect at a minimum the following information:

- Woman's address
- Phone number where she can be reached.

Agencies should have a procedure in place for notifying (card, letter, phone call) all pregnant women who no-show for their initial certification appointment. Documentation of this contact should be kept in the client's record.

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